Adobe® Acrobat® 6.0
Curriculum Guide

Lesson 4:
Annotating PDF Files

Annotating PDF Files

Level

Intermediate beginner. Students are assumed to have a basic understanding of the Adobe® Acrobat® work area from Lesson One. It is also assumed that students have experience opening, closing, and saving files on their computer.

Summary and Objectives

The purpose of this lesson is to introduce the student to the different markup tools available in the Acrobat application and to use these tools to create useful commenting and annotations for further use. This lesson will specifically introduce: (1) the Highlight tool, the Pencil tool, and the Notes tool, (2) the comment features associated with each tool, (3) the process of exporting, importing, and summarizing comments.

At the end of this lesson students will be able to:

1. Use the Highlight tool to mark up a Portable Document Format (PDF) document for later use.

2. Use the Notes feature of each markup tool to annotate the PDF file.

3. Set the status for review of comments in a document.

4. Export and import comments for sharing with others.

5. Filter and organize annotations using the Comments tab of the navigation pane.

6. Spell-check comments within the Acrobat application.

> ➤ *Lesson Four is designed to be taught in three one-hour sessions. The first hour will concentrate on the first two exercises which cover the commenting process used in a digital workflow. The second hour should be used for the student to practice the skills learned in the first hour by creating a variety of comment types and exchanging these electronically with classmates. Exercise three is devoted to this activity. These times may vary depending on the class.*

Key Terms for Lesson Four

Note: An electronic comment associated with a markup tool.

Markup Tool: one of a collection of tools used to digitally mark and make notes on a PDF file.

FDF: Forms Data Format; used for transferring collections of PDF file comments between computers.

Comments tab: Located at the lower left of the Document window. This is where all annotations and document markup is managed.

# Exercise One: Adding Comments to a PDF File

About Comments

In this exercise you should have the Acrobat Help file open in your work area.

Comment tools in Acrobat give a variety of ways to attach notes, mark up text, and add comments to a PDF document. In addition, sound and external files can be embedded.

There are different types of commenting tools—text markup, graphic markup, and comments. Each tool in the toolbar has hidden tools below. Clicking and holding the top tool reveals the others underneath.

The Commenting Toolbar

The Commenting toolbar is selected from the menu by choosing Tools > Commenting > Show Commenting Toolbar
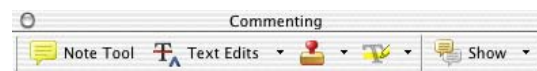
- The Note Tool allows you to place sticky notes on your PDF file.
- The Text Edit tool includes a number of highlighting features for making the editing and review process easier.
- The Stamp Tool allows dynamic stamps with date and time as well as standard business stamps and custom stamps to be applied to your PDF file.
- All commenting tools have popup notes associated with them.

The Advanced Commenting Toolbar

The Advanced Commenting toolbar enables different drawing shapes to be added to a PDF file. In addition, Text boxes, freehand pencil drawings, and attachments can be embedded in your document.
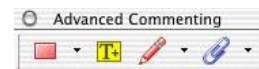
- The Highlight Text Tool is similar to the Text Edit tool and is used for general highlighting of Text
- The Graphic Markup tools include the Pencil, Square, Circle, and Line tools. Each one also can be associated with a text note.
- The Comment Tools include the Notes, Free Text, Stamp, Attach Sound, and Attach File tools.

The Comments Tab

The **Comments tab** shows all the comments in a document and sorts them by page, type, author, and date. There is a comment icon associated with each comment. The text is also displayed. Clicking a comment in this tab will jump to the page containing the comment in the document window.
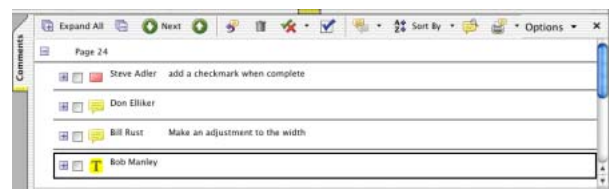
The Comment tab is located on the lower left-hand side of the document window.

Setting Comment Identity and Commenting Preferences

1. To set comment Identity choose Edit > Preferences > Identity.

2. Type your name.

3. Click the Commenting preference and be sure to check the bottom box, Copy Selected Text Into Highlight.

Now when you make a comment your name will appear as the author and any highlighted text will automatically be placed in its pop-up window.

The Note Tool

1. Select the Note tool from the Commenting toolbar.

> ➤ *Another way to select the Note tool is to right-click (Windows®) or Control-click (Mac), then select Add Note.*

2. Click on the location where you want to place the note. A blank note will appear. Type some information into the note.

To change the note properties do this:

1. Select it and right-click (Windows) Control-click (Mac) and choose Properties.

   Under the General tab, the author name that is in the identity preference is listed. It can be temporarily changed for this note by typing a new identity. The appearance can also be changed. In addition the review history can be updated.
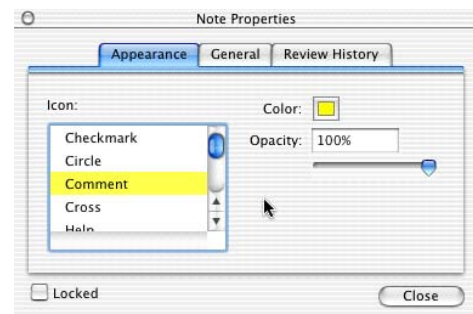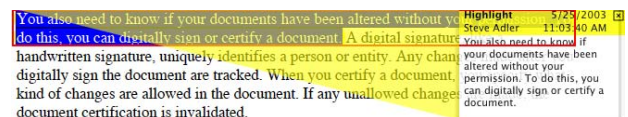
2. Move through the Help document and continue to make some notes.

The Highlight Text Tool

The Highlight Text tool and its associated text markup tools allow you to select text and mark it as you would with an ordinary marker. To use the Highlight Text tool do this:
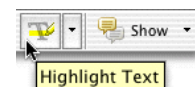
1. Select the Highlight Text tool from the toolbar.

2. Move the cursor to the beginning of the text you want to highlight and drag across it. You can also use the arrow keys on the keyboard to select text.

3. Alt-drag (Windows) or Control-drag (Mac) to mark up the text you want to highlight.

4. Right-click (Windows) or Control-click (Mac) the highlighted text and choose Open Pop-Up Note to reveal the text note. Notice the highlighted text automatically becomes part of the text note. You can change or edit the contents by selecting the text in the note and altering it.

5. To change the color or author of the highlighted text right-click (Windows) or Control-click (Mac) and choose Edit > Properties from the menu.

> ➤ *This is one of the most useful features for taking notes while reading a PDF document. As students read the Acrobat Help file, they should use the Highlight tool to take digital notes of important information.*

6. Move through the Help document and highlight more useful information. Be sure to move to different pages in your document as you take notes.

7. Click the Hand tool when you are done.

The Pencil Tool

The Pencil tool and its associated graphic markup tools allow you to add graphical marks and notes to your page such as circles, squares, and lines. To use the Pencil tool do this:

1. Click on the Pencil tool and draw on the page.

2. Carefully double-click on part of the line you drew to bring up a text note.

3. Add some text in the box.

4. Right-click (Windows) or Control-click (Mac) on the comment to change the properties of the line.

5. Save the document.

   The comments are now part of the Help file.
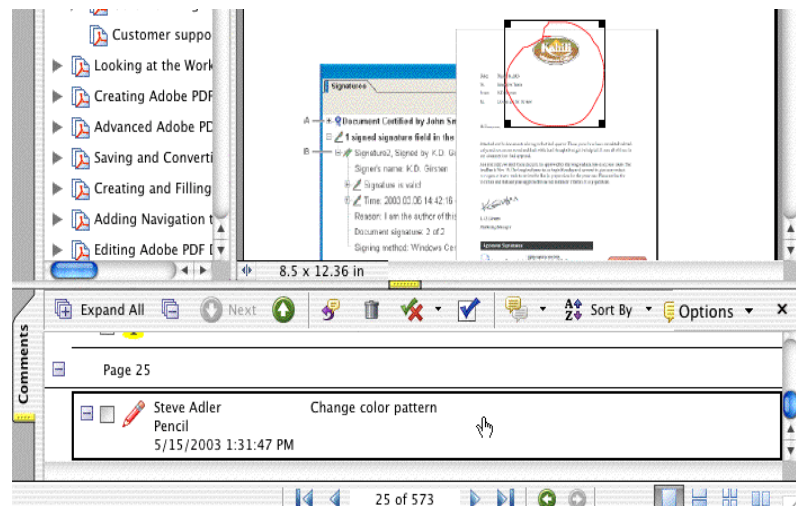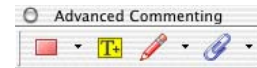
Exercise Two: Working with Comments

In this exercise you will take the comments that you made in the first exercise and work with them. You should have the Acrobat Help file with some annotations open in the Acrobat work area on your desktop.

Viewing Comments in a PDF File

1. Open the Comments tab by clicking it. The comments you have made should show up something like the example to the right.

2. At the top of the comments pane you can view, sort, and control your comments.

3. Select Expand All to see the details of all your comments.

4. Click on each comment to jump to the page in your document where it resides.
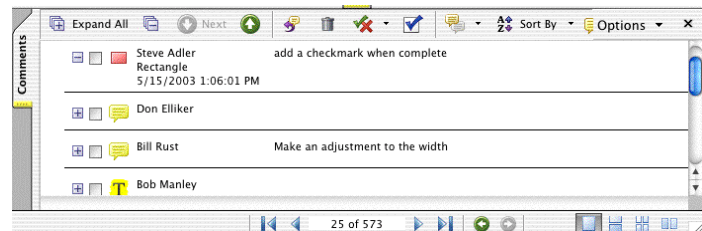
Summarizing Comments

By summarizing comments Acrobat creates a new PDF document containing all the comments in the annotated PDF file. This information can then be printed, saved, and used like any other PDF file. To summarize comments do this:
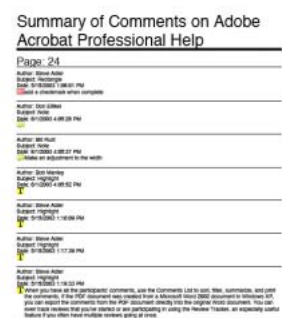
1. From the Options button at the top of the comments pane select Summarize Comments.

In the dialog box that opens you can choose the type of summary and click OK.
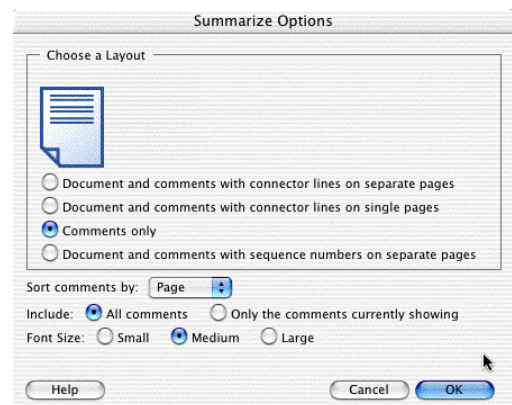
A new PDF file is created based on your choices containing a summary of the comments made in the Help document.

3. Save the Summary PDF file to your disk.

Deleting Comments

Comments are deleted by selecting them in the navigation pane and pressing the Delete key. To delete comments in a PDF file do this:

1. Click on the comment. Select more than one on a page by shift-clicking each comment.

2. Press the Delete key or right-click (Windows) or Control-click (Mac) and choose Delete. The selected comments and markups are removed from the document.
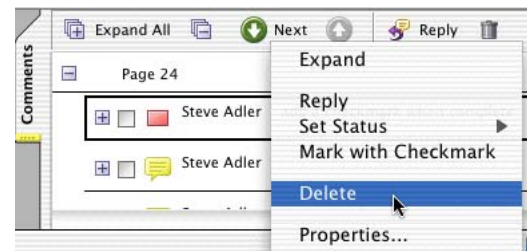
Spell-Checking Comments

Comments and form fields can be spell-checked within Acrobat for added convenience. If necessary, new words can be added to the user dictionary. To spell-check comments do this:

1. From the menu choose Edit > Check Spelling > In Comments and Form Fields … or press F7.

2. When the Check Spelling window appears choose Start.

3. If Acrobat finds a questionable word or simple punctuation error it will suggest corrections. You can choose to ignore or change the word, or add the questionable word to your dictionary.

4. Click Done when finished and save your document.
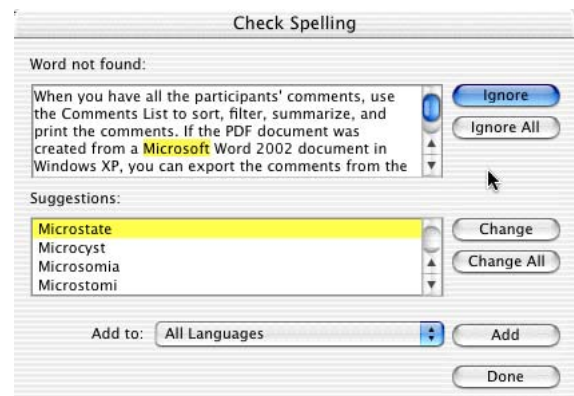
Exporting Comments

Comments can be exported in a PDF file so that others may use them on their copies of the PDF file. The comments are saved as a special Acrobat file called a Forms Data Format (FDF) file, which is much smaller than the PDF document. This FDF file can then be sent electronically to others. To export comments do this:

1. From the Acrobat menu choose Document > Export Comments.

2. In the Export dialog box be sure to leave the .fdf extension in the filename.

3. Save the .fdf file to your disk. These comments can now be shared with others as long as everyone is viewing a copy of the same PDF file.

> ➤ *Consult the Acrobat Help File for details on exporting comments. Based on your platform, workgroup, or workflow, comments can be shared and maintained in a number of ways both internally and via the Web and e-mail.*

Exercise Three: Collaborating in a Workgroup

One of the key advantages of working with a PDF document is that comments can be added and graphics markup tools can draw and place information in the document—giving the user the capability to annotate and review materials without harm to the original document. When working within a group, individuals can contribute to a document's review and/or revision at their own location and then distribute their individual annotations to each other for collaboration.

A workflow for digital collaboration involves these fundamental concepts:

- All users work within the Acrobat application.
- All users have the same PDF document available on their computers.
- Everyone uses a unique author name.
- A color-coded system is designed to help view different types of comments and annotations.
- Once the group has been formed and considered these concepts, and everything is in place, the collaboration process can begin.

In this exercise we will assume that all members of the workgroup will be using the Acrobat Help file as their common PDF document.

> ➤ *Students should work in groups of three to five for their workgroup. They should be able to exchange files either by e-mail, network, or disk. The goal of the exercise is to have each member of the group pick a topic of the Acrobat Help file and highlight important parts, as well as add comments and notes, to help the group master the important parts of the program. This should be agreed upon ahead of time.*

Setting Your Author Preferences

1. Choose Edit > Preferences > General and choose Identity from the list.

2. Type your name.

3. Close the Preference Box.

Annotating Your Help PDF File

Using the skills you learned in Exercises one and two, highlight and mark up your section of the Help file with other members of your workgroup. Be sure to use a variety of colors and different tools. Each tool is suited to a particular task.

Exporting Your Comments

1. Be sure to spell-check your comments before exporting.

2. From the menu choose Document > Export Comments.

3. Name the file with your name followed by the .fdf extension.

4. Save your comments to your disk. Be sure to keep the .fdf extension in your filename.

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Importing Comments

Everyone in the workgroup will need to distribute their own comments to the other members of the group. This can be done by e-mail, disk sharing, or network sharing.

After all comments have been distributed among the workgroup, do this:

1. From the menu choose Document > Import Comments.

2. Navigate to the folder where you have stored the other member's comments and click Select.

3. Repeat this until each member's comments have been imported into your own Acrobat Help file.

4. If the Comments tab is not already open click on it to open it from the document window. Notice that each member's comments are now part of your file.

5. In the Comments window select Sort By and try sorting the comments.

6. Sort by Type or Author.

7. Select Show to help filter the different comments from view.

8. Expand and click on the different comments to jump to the location in the Help file where the comment resides.
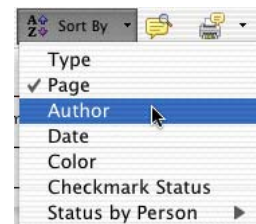
Setting Comment Status

Since each member of the workgroup covered a different topic in the Help file, you can manage your status of each comment's review by using the checkbox in the Comments window:

1. In the Comments window check the comment whose status you want to set.

2. Right click (Windows) or Control-click (Mac) and select Set Status.

3. Choose Completed.

4. Continue this process as you review the comments.

5. Right click (Windows) or Control-click (Mac) a comment to bring up the Properties selection.

6. Choose the Review History tab.

The changes in comment status are listed.
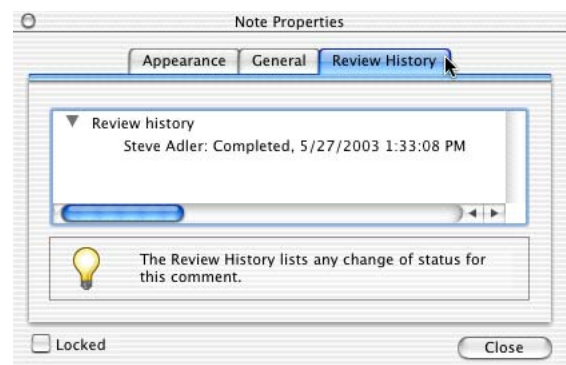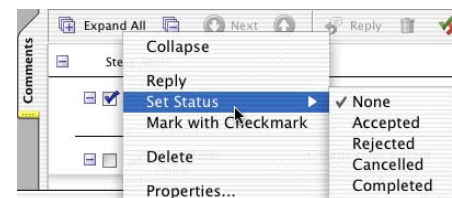
Activities

1. Have students break into workgroups and create a color scheme and icon system for submitting annotations. Let them use different filter techniques to find out what works best.

2. Have volunteers look into the different markup tools and present the different ones to the class. There are many surprises that can make this activity enjoyable.

3. The Stamp tool can be interesting. Have students use the Help file to research how custom stamps can be made.

> ➤ *Commenting is a major feature in Acrobat collaborative settings. If time permits students should explore these in detail.*

Additional Adobe Resources on the Web

Visit the Adobe Education Web site at www.adobe.com/education for additional resources:

*   Instructional resources—free lessons, course guides, and projects that incorporate Adobe tools: www.adobe.com/education/curriculum/main.html

*   Complete product information—Learn about Adobe's complete line of integrated, award-winning products: www.adobe.com/education/ed_products/main.html

*   Training opportunities—Build your Adobe software skills with free and discounted training resources: www.adobe.com/education/educators/training/main.html